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Fragmentation crowded playlists top issues at CRS

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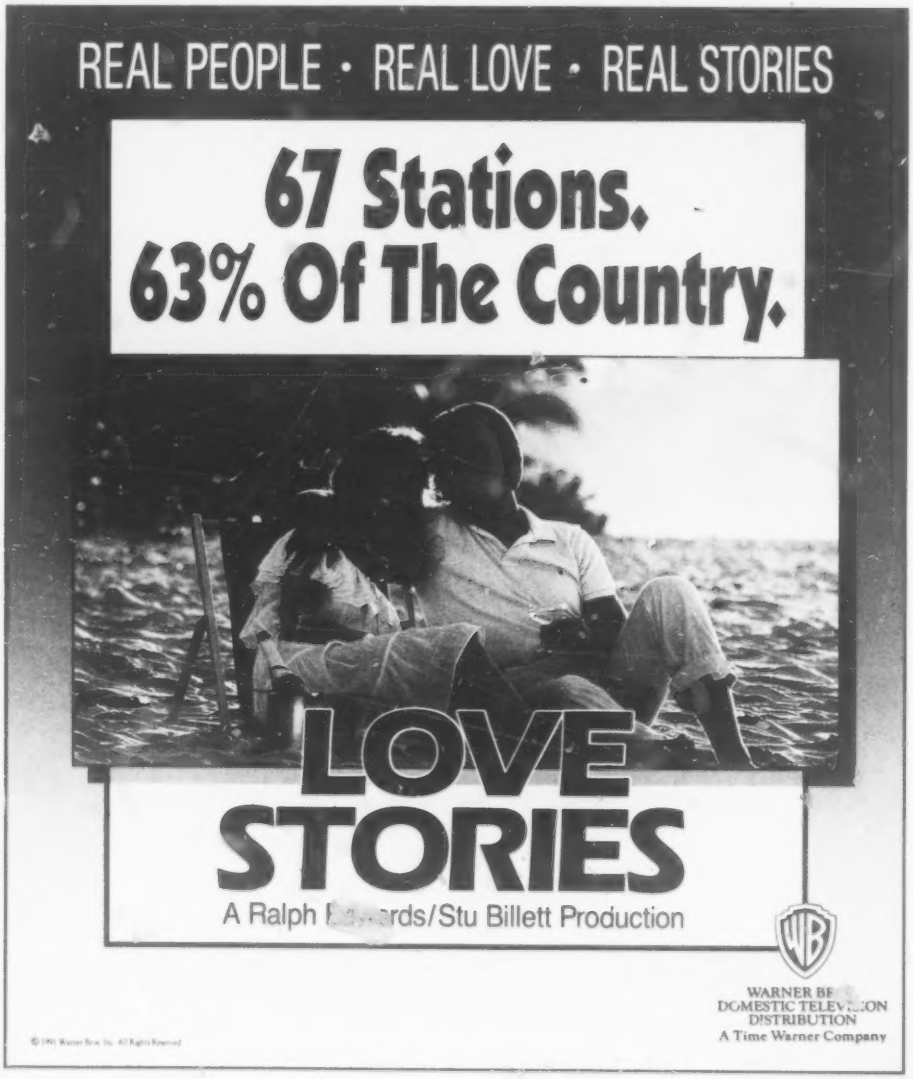
Improved sensitivity added to latest CCD cameras



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End in Sight for TV's War

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THIS WEEK

27 / PRICE OF WAR

By the time President Bush announced last week's cease-fire in the Middle East, the war was believed to have cost the three broadcast networks and CNN a collective $145 million in production costs and lost advertising revenue. But spending was not expected to stop there, as the networks found themselves busy mapping out strategies for continued coverage of developments in the region and wondering how soon skittish advertisers would return to the network schedules.

30 / FNN TO CNBC

NBC has signed a definitive agreement to buy the media assets of its chief competitor, Financial News Network, and plans to combine the two networks into one. That deal has effectively scuttled an agreement in principle FNN had with Dow Jones and Group W two weeks ago.

32 / GUARANTEES TO ADVERTISERS

NBC and CBS dropped their controversial PUT policies for traditional guarantees last week, saying that because the networks did not use traditional guarantees, as much as $100 million to $200 million went to other companies, such as Fox. ABC has not yet said whether it will drop the PUT plan (which was developed last June by NBC) for traditional guarantees, but most media buyers expect it will.

Kuwaiti women welcome allied troops into Kuwait City (page 27)

Media buyers were pleased by the news, but were not surprised.

In other marketing news last week, CBS named Joseph Abruzzese senior VP, CBS TV network sales. Jerome Dominus, senior VP, entertainment marketing and sales, was named senior VP, sales and media development.

32 / NEW PROPOSAL

The broadcast industry is in a quandary over how best to deal with the issues of must carry and retransmission consent. As a result, a new proposal has emerged—"I pay/you pay"—which would amend the Communications Act to give broadcasters the right to grant or withhold retransmission consent.

33 / WINNING SWEEP

CBS executives were buoyant last week after the network's first outright sweeps win in six years, which put CBS in a season-to-date tie for second place in prime time with ABC. A jovial CBS/Broadcast Group President Howard Stringer even did magic tricks for reporters before a briefing by CBS Research chief David Poltrack, who Stringer said, needed extra time to reorganize his presentation because, for once, there was no need to "torture the numbers into submission." Poltrack believes CBS is now positioned to make a run at first place NBC next season.

35 / NETWORK RADIO: THE BUSINESS OF SERVICE

This Special Report looks at network radio programing and services, the fundamentals of station image. It examines the resurgence of news—both commercial and public—and niche targeting as two trends in the industry.

46 / CRS: LIVE FROM NASHVILLE

Unistar's Ed Salamon talks about the country music format's growing strength as radio operators prepare for the upcoming Country Radio Seminar at the Opryland Hotel and Convention Center in Nashville.

47 / PREMIUM SITCOMS

Warner Bros. Domestic Television Distribution's off-network sales of *Murphy Brown* and *Full House* are each approaching 100 markets sold at what are considered to be premium cash license figures.

48 / PILOT CUTBACKS

As a means of cutting costs, TV networks will be ordering fewer pilots and more pilot presentations, and making better use of made-for-TV movies and specials as the basis for series, according to network

MTV Networks' Tom Freston (page 68)

development executives discussing the process by which network schedules are made.

52 / SPORTS SERVICES PLAY BALL

Several regional cable sports services that carried baseball for the first time last year are trying to increase their market share before the start of the Major League Baseball season, five weeks from now.

54 / LAUGHING MATTER

Comedy TV, now called CTV:The Comedy Network, reveals its programing schedule, which combines original and acquired programing from both Viacom's HA! and Time Warner's The Comedy Channel. They merge April 1.

54 / PPV HEAVYWEIGHT

Boxing remains cable's pay per view money winner, with one fight equal to three to four months of revenue generated from PPV movies. Along those lines, Showtime will officially begin its association with boxing promoter and former HBO ally Don King March 18, with a match between Mike Tyson and "Razor" Ruddock, in the first of what are to be quarterly "mega-fights."

56 / LARGER CONUS MAP

Conus Communications plans to kick off its Northeast regional cooperative, bringing the satellite newsgathering system closer to its goal of creating nine regional co-ops nationally by next summer. If all goes according to schedule, by July 1 co-op members will have access to more than six additional stories from their region on a daily basis.

Special Report: Network radio (page 35)

57 / PARAMOUNT BROADCASTING

Paramount is wrapping up its acquisition of TVX Broadcast Group, giving the entertainment company six independent stations that reach almost 10% of the country. Last week, the TVX board approved Paramount's $60.50 per-share offer, and Paramount expected to have the deal—which, including consulting fees and expenses, comes to about $60 million—wrapped up by today (March 4). The proxy statement outlining the deal projects bullish growth for the station group through 1995.

63 / BROADCAST LENDING

Hogan & Hartson's petition asking the FCC to allow lenders to take a security third-party interest in an FCC license will likely increase the banking community's comfort zone, many believe. And that, in turn, may bring relief to broadcasters in need of a few dollars. Others, however, say the petition may undermine many assumptions inherent in broadcast lending.

64 / HYPERCAM

Sony will have integrated its sensitivity-enhancing Hyper HAD sensors into its entire line of CCD cameras in time for the 1991 National Association of Broadcasters convention. TSM, robotic camera system developer, pushes for improved interfaces for automated systems.

66 / AMPEX BOSS SPEAKS

Ed Bramson, owner, president and chief executive officer of Ampex Corp., said the company is financially sound and not for sale, in spite of flat revenue and recent layoffs. The layoffs have ended, he said, and a rebound will follow the introduction of significant new TV products in 1992.

68 / INTERNATIONAL FOCUS

Tom Freston, MTV Networks chairman and CEO, said the growing international TV marketplace holds both "tremendous potential" and warnings for American TV suppliers. He said the breakdown of GATT talks may create a system where countries might establish their own rules regarding the importing and exporting of programing.

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Broadcasting (ISSN 0007-2028) is published 52 Mondays a year by Broadcasting Publications Inc., 1705 DeSales Street, N.W., Washington, D.C. 20036. Second-class postage paid at Washington, D.C., and additional offices. Single issue $2.50 except special issues $3.50 (50th Anniversary issue $10). Subscriptions, U.S. and possessions: one year $85, two years $160, three years $225. Canadian and other international subscribers add $40 per year. U.S. and possessions $400 yearly for special delivery, $100 for first-class. Subscriber's occupation required. Annually: *Broadcasting* □ *Yearbook* $115, *Across the Dial* $9.95. Microfilm of *Broadcasting* is available from University Microfilms, 300 North Zeeb Road, Ann Arbor, Mich. 48106 (1-800—521-0600). Postmaster, please send address corrections to *Broadcasting*, 1705 DeSales St., N.W., Washington, D.C. 20036.

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FLAT OUTLOOK FOR RADIO NETWORK REVENUE

Although advertising expenditures are down, network executives remain optimistic of rebound following end of Gulf war and recession

By most accounts, the old theories that "radio always does well in a recession" aren't holding up. According to Radio Network Association figures, network radio revenue grew a modest 1.3% in 1990 compared to 1989, with a 7.8% loss (see graph) in the last quarter of the year, when the recession officially began. While up-front 1991 was strong going into the new year, the scatter market was softer than anticipated, and ad dollars dried up almost completely Jan. 16, the day the U.S. went to war. Despite the burgeoning stock market and declining interest rates, the recession and the war postponed many advertising buys—or dissolved them altogether.

On the bright side, RNA President Bud Heck is optimistic that network radio still could experience 5% to 6% growth by the end of the year. "We expect that the war and the recession both will be resolved, and the stock market is going like crazy. These are very positive signals that the economy is expanding, and if we get a sudden halt to the war, this downturn should be very short-lived."

By last January most radio networks found that 1991 might prove to be a challenge equal to 1990. Although the industry still realized a modest 2.4% increase for the month, the outbreak of the Persian Gulf war Jan. 16 caused some clients to decide not to advertise in a war environment. Money that had been earmarked for ad schedules was either delayed or returned to the bottom line.

Unistar Radio Networks Co-Chairman and Chief Executive Officer Nick Verbitsky said that world and national events have "permeated the advertising industry to the point where business has just dried up for every medium." He noted that in past economic declines, radio had been considered resilient and recession-proof, which was not the case this time. "Because every medium is in such a slump, the price advantages of radio just don't exist," he said.

The unpredictable element, in the advertising equation was the war, "because in modern times we haven't had a declared war, so we weren't prepared," Verbitsky said. Because consumers are still buying products and the stock market is doing so well, while all media, including radio, have experienced slump, "several chapters of economic theory will be rewritten," he said. "By and large, when someone is looking for a truly national medium, radio is an excellent buy." During an economic slump, he said, advertisers don't say "cancel newspaper and magazines, cancel outdoor, cancel network television and cable, but keep that network radio schedule."

Verbitsky predicted that once the war successfully ends and the recession turns around, "business will do better, the country will do better and we'll get back that optimistic, positive attitude that's in short supply these days."

Robert Kipperman, CBS Radio Networks vice president and general manager, optimistically anticipates slight growth in 1991, but cautioned that "at this point it will be only marginally better than 1990, and is largely dependent on the length of the Persian Gulf war and other economic factors." He said one bright spot could come indirectly, through increased postal rates, which could force some advertisers to rethink using direct mail. "If some of these companies cut back, the radio industry could reap the benefit—and conceivably make 1991 better than we've anticipated."

Sheridan Broadcasting Networks President Jay Williams agreed that 1991 has been much softer than anticipated. "The number of up-front clients fell off dramatically and we're disappointed by what we see for the first quarter," he said. "We see signs of hope for later in the year, but things are uncertain due to the economic climate that many of our clients are experiencing, as well as their reluctance to commit to long-term situations when they don't know their own situations." Still, Williams was optimistic that business will improve.

Prior to fourth quarter 1990 economic stagnation, virtually every radio network restructured its sales and/or programing efforts. Unistar actually began the trend in 1989 (BROADCASTING, Aug. 28, 1989), followed by CBS Radio in February 1990 (BROADCASTING, Feb. 12, 1990), ABC in May (BROADCASTING, May 21, 1990), and Westwood One later that summer (BROADCASTING, Aug. 20, 1990). What contribution might these reconfigurations have had on flat network radio revenues?

"Absolutely none," said ABC Radio Networks' Lou Severine, senior vice president and director of sales. "In fact, it allowed us to tack on two percentage points in business we would not have gotten otherwise." Until the war broke out, ABC was running 10% ahead in up-front, which normally accounts for 55% of the network's business, he said.

Severine concedes that following ABC's reconfiguration "there was a lot of confusion and we had a lot of explaining to do." But, he said, by mid-summer the agencies and advertisers had adapted to the new five-network structure. "By then everybody had forgotten the old networks such as Information and Direction, and after that we had no problems," he said.

CBS Radio's Kipperman agreed that reconfiguration required a period of explanation, "as with anything that's new. But once we specifically detailed what was done, they understood and accepted what we did." Kipperman suggested that, as a whole, reconfiguration received high marks, not only because of realigned sales strategies, but also because it has allowed some networks to evaluate programing and services with the eventual purpose of cutting elements that were no longer economically or strategically viable.

RADIO NETWORK REVENUES, 1987-1990

(in millions)

Quarter	*1987*	*1988*	*1989*	*1990*	*% chng ('90 vs. '89)*
First	$81.05	$80.60	$90.62	$94.13	3.8%
Second	97.28	95.68	106.94	108.57	1.5%
Third	94.37	97.50	106.75	116.57	9.2%
Fourth	97.80	108.13	122.87	113.26	-7.8%
Total Year	370.50	381.91	427.18	432.53	1.3%

Source: Radio Network Association.

"In this evaluation and analysis, networks analyzed those services that their affiliates could really use," he said. As such, "it was a positive move, and it enabled networks to fine-tune the programs that were kept on the air to make them even better."

The general thesis behind network restructuring was to make the sum of a network's parts greater than its individual programs and services, said William Battison, president and chief financial officer, Westwood One Inc., which operates Mutual Broadcasting, NBC Radio, and The Source. "The intent was to solidify and codify certain network elements into efficient packages that were more attractive to advertisers than if those elements were sold separately," he said. "We all recognize that in this day of diversity and options available to radio stations, the old days of network radio are over. There's a great variety of ways a station uses our product, so we've taken that flexibility and packaged it sensibly for the advertiser by creating permanent packages and giving them a definition or name."

Battison said each network had its own corporate objective, and he insisted that rather than striving to be number one, Westwood One restructured to "provide the most rational combination of elements for the advertiser." Battison said being first was less important than "giving the advertiser something that was consistent and contiguous in terms of the line-up of stations, and provided a measure of comfort and trust that they were still buying the individual networks they had prior to reconfiguration. We moved some inventory, but overall we kept our franchises intact, and also created a new network from pieces of those."

In the new order of network radio, rank no longer matters, Battison said. "What advertisers are looking for is what you can deliver in terms of efficiencies and effectiveness to the advertiser. Nobody's going to buy you just because you're number one, two, or three, because there's only a handful of major networks today." In most cases, network restructuring was undertaken to "make the advertiser's job easier," Battison said. "It gives them more audience, more numbers, better gross ratings points, numbers that are more in tune with what advertisers are accustomed to buying." He noted that one ABC network has a 2.3 rating, "which is great because it's closer to cable's numbers."

All told, agencies and advertisers have greeted restructuring with optimism, Battison said. "Once the dust settled, everyone realized they were still buying the same big four networks and the same two ethnic networks, and the gross rating points were being provided in a manner that was easy to look at, track, and follow." He also predicted that, over time, this approach will not be special to network radio. "In a year or two cable will also be looking at ways to package themselves more effectively, and 10 years from now you may see the major TV networks in a similar situation."

Still, some confusion remained when RADAR 41 was released in August (BROADCASTING, Aug. 20, 1990) and possibly lingers with the release of RADAR 42 last month (BROADCASTING, Feb. 25). Individual networks were charged with confusing network audiences before and after the restructuring period, which some critics, including some radio network executives, criticized as apples and oranges.

Not so, said ABC's Severine. He claimed that, to adapt RADAR 40 and

NewsTALKRadio
NETWORK

The Newstalk Radio Network and WNTR AM 1050. . .

. . .acknowledge with gratitude the exceptional efforts volunteered by members of the Washington, D.C. Society of Broadcast Engineers.

When fire destroyed our studios during the early morning hours on Saturday, February 23, the following engineers contributed their time and expertise throughout the weekend, enabling us to get temporary studios built and functioning by 5:00 a.m. Monday morning:

Tom McGinley, WPGC AM/FM
Ed Bukont, WPGC AM/FM
Mike Serafini, WHFS-FM
John Hofstetter, WMET-AM

We also appreciate the efforts of Chris Keenan, Supervisor of Special Services, C&P Telephone, who spent his Sunday installing the many phone lines we needed. We also wish to publicly acknowledge the tireless efforts of our own Chief Engineer, Dave Allen, and Operations Assistant, Tim Shermer, who went for 48 hours without sleep until the job was done.

Warm thanks to all who helped us continue providing our timely, compelling and interesting Newstalk product to America.

NTR

COMPENSATION VITAL TO NETWORK AFFILIATIONS

Station compensation remains a major factor in the relationship between a network and its affiliates. Through this "revenue sharing" plan, a network compensates a station for relinquishing valuable inventory in return for airing network spots. The more spots a station clears and the greater its audience, the more its compensation—or so the theory goes. For competitive reasons, networks are reluctant to divulge specific numbers regarding their compensation strategies, but several network presidents privately agreed that the most valuable affiliates receive upwards of $1 million for their network affiliations.

Most major radio network executives view compensation as a necessary evil of doing business. Among them are:

■ ABC Radio Networks Senior Vice President/Director of Sales Lou Severine: "Compensation will always be a fact of life, but we've tried to make it a little less important. If you have nothing to offer a station but money, you're at a disadvantage. We know we have to do more for the stations than just give them money, because when they compare what we can give them per spot versus what they could do locally, we're going to lose every time."

■ CBS Radio Networks Vice President/General Manager Bob Kipperman: "Over the last 4½ years we've developed our programing and services so they would play an important factor when we talked with potential stations for affiliation. We found that our resources today are far better than they were a few years back, which has enabled us to go in and provide services to stations they can't otherwise get. Our key is to give them programing and services that will make them stand above the competition in their markets. Compensation, unfortunately, is still part of our business, but we are continuing to look at providing better programing and services in order to reduce compensation."

■ Unistar Co-Chairman/CEO Nick Verbitsky: "Compensation is our biggest budget line item, and that will be maintained as business gets tighter. We obviously negotiate as hard as we can, and so do the stations. We win some and we lose some, just like everybody. Everybody knows the game plan: we're trying to buy time as efficiently as we can from a network standpoint, and generally that's what compensation boils down to."

■ Westwood One President/CFO William Battison: "Compensation always will be important because of the relationship between the network and station in today's marketplace. However, as we have seen in the last five weeks, the nature of the product is incredibly important. This is why we've made an effort to improve upon the NBC and Mutual news operations. Compensation is a function of audience and inventory and, while it's not a straight-line equation, the station that carries enough spots and has enough audience is worth a lot of money. Generally, it comes down to buying audience wholesale and selling it retail. If you pay too much you lose money on the transaction."

■ Sheridan Broadcasting Networks President Jay Williams: "Compensation continues to be a large part of any network's cost, and certainly is the largest cost factor in operations for all networks. We would rather approach it from an ability to service better rather than just a dollar amount, but sometimes from a competitive standpoint we see needs to increase compensation to remain competitive in the marketplace."

41 to new configurations in RADAR 42, those networks that reshuffled audiences under new names theoretically apportioned the audiences from the old networks to the new networks. "Nothing has changed," he said. "Whatever audience we have taken from one network and put on another network, that's the audience that will be on that network. That's all there is to it."

Whatever confusion does exist in RADAR comes in determining network rank, which is of little importance to the advertiser, said Kipperman. "Whether a network is number one or five, it basically comes down to cost per thousand for a particular daypart, not network rank." Other factors that also preclude raw RADAR numbers and rankings include qualitative audience and in-programing spots (those that run within network programing vs. those extracted from network content). "In-programing is extremely important for a number of advertisers who can be assured they will run within a newscast, or baseball, or football, or the Masters."

While RADAR has proven to be acceptable to agencies and clients as a measurement tool, Sheridan's Williams suggested that network reconfigurations will force agencies and advertisers to look beyond numbers to capture the full value of the network radio audience. "With all the changes that have occured over the last year, we can't just look at the numbers as the sole methodology for value," he said.

One of ABC's stated objectives in its restructuring plan was to draw business from other media. As part of this push the company has aligned itself with *Newsweek* magazine, Times Mirror and Lifetime Cable "to go after dollars we can't necessarily get," Severine said. "That's the wave of the future and anybody who thinks otherwise—no matter what they're selling—is going to be lost." Severine said the buzzword of the 1990's is "value-added" and suggested that was why such cross-media ventures are becoming attractive. "Advertisers know that if they spend $1 million on three pages for five issues in *Newsweek*, and $1 million advertising on ABC—they get more than just buying $2 million worth of advertising," he said.

Unistar's Verbitsky said that radio should enjoy more of this growth than other media, largely because of the stagnation of magazines, newspapers and network TV. "Radio will continue to experience strong audiences because people still listen to it as they have for years," he said. "Not everybody watches network television anymore, and newspapers and magazines aren't read by a lot of people anymore—especially in the younger demos."

Jay Williams said network radio is poised to reap the benefits of the continued high cost of TV while audiences drop. "More clients are looking to us for alternatives that can provide the reach and frequency they're looking for while they trim their overall budgets," he said. Accordingly, a number of advertisers have investigated more use of network radio as a medium, "and they're looking to other media to replace GRP delivery and a high cost of television," Williams stated.

Kipperman said that reconfiguration has allowed network radio to carve out a lead that other media eventually will follow. "We have positioned ourselves for the future, and we will start to reap some of the benefits from these changes over the next two or three years," he said. "As the economy starts to get healthy, there's no question we will grow at a faster pace than the economy." –BEB

RADIO

COUNTRY FORMAT BENEFITS FROM NEW ARTISTS, CHANGING PERCEPTION OF AUDIENCE

Advertisers, who are increasingly using country performers as spokespersons, have played major role in changing image of country music listener

Country music is the most popular format programed on radio stations in the U.S., according to the BROADCASTING YEARBOOK. Over the last decade, country-formatted radio stations have benefitted from a wealth of new artists and new country music styles, making such performers as Randy Travis, The Judds, Reba McIntire, George Strait and Ricky Skaggs household names across the United States. Madison Avenue has led the way in changing the perception that the country music listener is an undesirable target for advertisers.

According to Ed Salamon, president, Unistar Radio Networks, and member of the Country Radio Broadcasters board of directors: "Country radio is a format that is largely driven by the music, and country music is in better shape today than it has ever been before." There was a time when it was thought that a country album could only sell gold or platinum if it crossed over to the pop music charts, said Salamon. But Randy Travis shattered that myth when his albums went platinum, fueled only by play on country stations. "In a sense, radio has never had better product to work with—it has never had more popular product to work with than it does at this time in history," Salamon said.

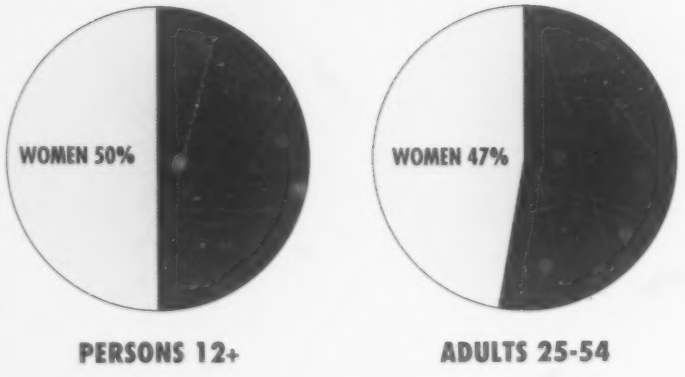
The prospects for country music look good. According to numbers compiled by Katz Radio Group Research, one out of every six Americans is reached by country radio every week. More importantly, the country music listener indexes above the norm (100) in product consumption categories such as domestic travel (107); personal bank loans (123); sporting goods (115); convenience stores (108), and diet soft drinks (105). As for lifestyle categories, the numbers show married listeners, 112; household size over five, 111; children under 18, 117, and owning a residence, 107.

According to Salamon, the advertising community has played a key role in changing the perception of the country music listener. "The people at Coca-Cola are probably one of America's most sophisticated advertisers," he said. "They chose Randy Travis as their spokesperson. They didn't do that to promote Randy Travis, they did that to promote Coca-Cola." Another example is Oldsmobile, which chose the mother-daughter singing duo, The Judds, for the car manufacturer's "This is not your father's Oldsmobile" campaign.

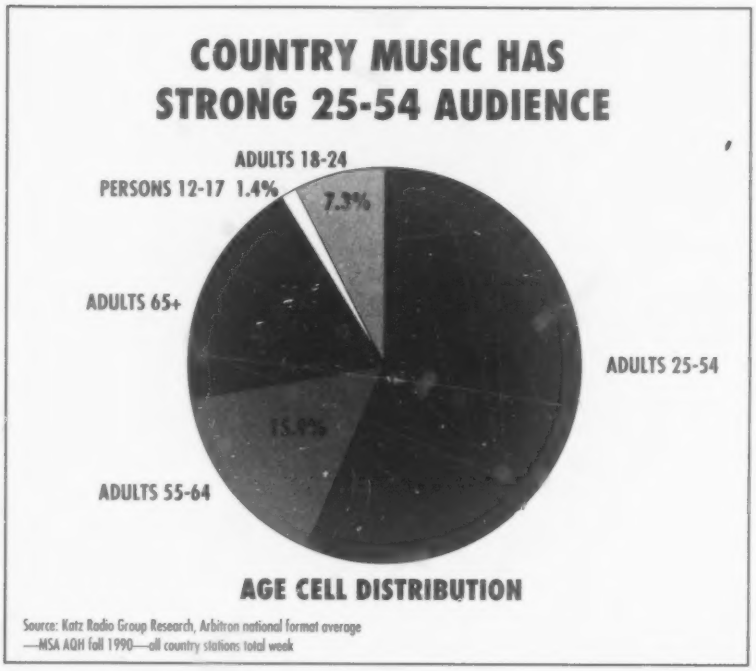
"So it has turned," said Salamon. "Not only is there a lack of a negative stereotype, there is a positive attraction to country music. And proof of this is that the advertisers are going after country artists as spokespersons."

A large part of country music's attraction stems from its strength with the 25-54 age demographic (see chart). Although radio stations have been shifting their emphasis from the 18-34 demographic to the 25-54 one, country is well-prepared to meet the challenge, said Salamon. "The Country Radio Seminar is one of the reasons that country radio is such a strong competitor," he said. "One can't underestimate that show [which attracts more than 1,000 participants each year] as a force for country radio. Every station that goes to the Country Radio Seminar comes back better prepared to fight the radio wars in their markets," Salamon said. "Add that to what I mentioned earlier about the music being more popular than

COUNTRY LISTENERS EVENLY SPLIT AMONG MEN, WOMEN 12+ AND 25-54



Source: Katz Radio Group Research, Arbitron national format average —MSA AQH fall 1990—all country stations



ever," he added, "and you have a one-two punch which makes the future of the format very healthy."

Another phenomenon of country music has been its ability to resist fragmentation. While formats such as CHR, adult contemporary and rock have been splintered into three and four mini formats, country music has in large part resisted that trend. "What you have is a musical consensus," said Salamon. "You have generations of country music listeners all agreeing on some of the same artists and types of music." Young listeners enjoy the music of older or "heritage" artists; older listeners line up for new performers such as Travis and Strait. "Strangely enough, George Jones will tell us that he is a George Strait fan and vice versa. I do believe that this is part of the music's strength and helps it resist fragmentation," Salamon said.

Strong ties also exist between the artistic community and the country radio stations. And radio programers formatting country stations tend to like country music, said Salamon. "That may seem an obvious statement," he said, "but not all radio programers are fans of the music they program." -LC

NASHVILLE NOTES: THE COUNTRY RADIO SEMINAR

The Interep Radio Store will unveil the next step of its Radio 2000 plan, the formation of the "Country Radio Format Network," at the 22nd annual Country Radio Seminar this week in Nashville (March 6-9). Marc Guild, president of marketing, and Les Goldberg, president, Interep, will present the details at a breakfast on Saturday, March 9. The network will be the first of a group of national networks being developed under the Radio 2000 program, and will match heavy listeners of country radio with heavy users of advertisers' products and/or services.

Larry Daniels, president of the Country Radio Broadcasters, and general manager, KNIX-AM-FM Phoenix, expects this year's CRS attendance to be down somewhat from 1990. "But," he said, "we are coming off 30%-40% increases over the last two years." Daniels expects seminar discussions to be dominated by two issues: "There is such a tremendous amount of country music product right now," he said, "that there isn't enough room on the playlists. Stations are struggling to increase their playlists because there is not enough opportunity to play all the good music that is out there." As a result of the wealth of product available, Daniels said, the second issue is format fragmentation. Although country radio has so far resisted fragmentation, Daniels sees splits at the seams of the format. "We are seeing pull in the directions of traditional, rock and contemporary country," he said.

"On the Road Again" is the theme of the CRS, which is being held at the Opryland Hotel and Convention Center. Workshops, educational panels and discussions dealing with both the radio and music industries are among discussion highlights. Among the headliners: Roy Blount Jr., writer and humorist; James Gregory, comedian and Epic recording artist; Dick Orkin, president, Dick Orkin's Radio Ranch and Home for Wayward Cowboys, and country musician George Strait.

Bob Pittman, chairman and chief executive officer of Time-Warner and one of the founders of MTV, will participate in the panel *Music Video, See It Now: New Artists, New Hits, New Listeners*, an analysis of music video's role in breaking in artists, selling product, building image and its effect on the radio listening audience.

Other panels slated for the convention include *Breaking the Country Bias: Qualitative and Quantitative Sales Tools You Can Use*, with panelists representing the advertising community; *Format Fragmentation: Finding your Niche Can Be a Bitch*, will examine hybrid formats and their competitors; *Account Development: Getting the Most from Your Clients*," on how to turn $500 accounts into $25,000 accounts; *The Artist Explosion: Too Many Faces and Not Enough Places on the Playlist*, looks at differing priorities of radio stations and record companies; *Promotions for All Markets: One Size Fits All*, outlines successful promotions for different market sizes and station demographics; *Formatics: The Nuts and Bolts of Daily Programing; Database Marketing for Less Than You Think*, and *Caught in the Crossfire: How the Music Industry Copes with Radio Range Wars* will discuss competitive tactics between radio stations in the same market and how that affects record companies with regards to promotions, interviews and new releases.

There also will be two longform sessions. The first will feature Charles Garfield speaking on having a management game plan for the 1990's. Dick Orkin and Cristine Coyle will talk about overcoming the worst creative obstacles.

The Canadian Country Music Association will return to the Country Radio Seminar for the second consecutive year. CCMA will host the seminar's Saturday luncheon and present Canadian talent to the attending broadcasters. -LC

RATINGS ROUNDUP

For the week of Feb. 18-24, CBS scored its second straight weekly win, the first time the network has enjoyed consecutive wins since the 1986-87 season. CBS finished the week with a 15.1 rating and 24 share, followed by NBC with a 14.1/22 and ABC with an 11.9/19.

Powering CBS's performance last week was the two-part mini-series *And the Sea Will Tell*, which scored a 20.1 rating and 30 share for part one on Sunday, Feb. 24, helping the network win the night. *The Grammy Awards* (18.8/31) and *The Miss USA Pageant* (16.4/28) helped the network to win Wednesday and Friday nights, respectively. CBS also won Tuesday night with *Rescue: 911* (16.1/25) and the two-hour movie, *Sins of the Mother* (14.5/23). In all, CBS had four of the top 10 programs, ABC three and NBC two. Fox's highest rated show was *The Simpsons*, which came in at number 26 with a 15.4/2.

Not surprisingly in a sweeps period, of the top 20 programs of the week, almost a third were specials, including CBS's tribute to Mary Tyler Moore, which came in at number 11, and an NBC special on the predictions of Nostradamus at 17.

Week 23 **NTI Network Prime Time Report for week of Feb. 18 - Feb. 24**

1st column tells rank, 2nd column tells position compared to last week: ▼-Down in rank from last week, ▲-Up in rank from last week, ■-Premiere broadcast. 3rd column tells rating, 4th column tells network, 5th column tells show.

1	▲	21.6/33	N	Cheers
2	▲	20.3/30	N	Love, Lies/Murder, Pt.2
3		20.1/31	C	Movie: Sea Will Tell, Pt.1
4	▼	19.0/30	C	60 Minutes
5		18.8/31	C	Grammy Awards
6	▼	18.6/28	A	Roseanne
7		18.2/26	C	Murphy Brown
8	▼	17.8/30	A	Full House
9	▲	17.6/26	A	Amer. Funniest People
9	▲	17.6/26	A	Amer.Funniest Videos
11		17.4/26	C	Mary Tyler Moore
12	▼	17.3/27	N	A Different World
13	▲	17.1/26	N	The Cosby Show
13	▲	17.1/25	C	Major Dad
15	▼	17.0/28	A	Family Matters
16	▼	16.9/25	C	Murder, She Wrote
17		16.5/24	N	Nostradamus
18		16.4/28	C	Miss USA Beauty Pageant
18	▼	16.4/25	N	Unsolved Mysteries
20	▼	16.2/24	A	Coach
20	▼	16.2/26	N	Wings
22	▼	16.1/28	N	L.A. Law
22	▲	16.1/25	C	Rescue: 911
24	▲	16.0/24	N	Fresh Prince Of Bel Air
25	▼	15.7/24	N	Matlock
26	▲	15.4/24	F	The Simpsons
27	▲	15.2/23	C	Evening Shade
28	▼	14.9/23	A	Who's The Boss?
29	▼	14.7/22	N	Heat Of The Night
30	▲	14.5/23	C	Sins Of The Mother
31	▲	14.2/21	A	Davis Rules
32	▼	13.9/22	N	Good Morning, Vietnam
33	▲	13.4/20	N	Blossom
34	▲	13.0/22	C	Knots Landing
35	▲	12.8/19	A	MacGyver
36	▲	12.5/21	A	thirtysomething
37	▲	12.4/18	F	In Living Color
37	▲	12.4/18	F	Married...With Children
39	▼	12.3/21	A	Perfect Strangers
40	▼	12.2/19	A	Doogie Howser, M.D.
41	▼	12.0/21	A	20/20
42		11.8/18	A	Movie Spec.: Columbo
43		11.2/17	A	Fire! Trapped-37th Floor
44	▼	11.1/17	A	Growing Pains
45		10.6/19	N	Amen
46		10.5/18	N	The Empire Strikes Back
47	▲	10.4/16	A	Movie: Bull Durham
48	▼	10.3/17	A	Going Places
48		10.3/18	A	Gulf War Day 39
50	▲	10.1/16	A	Father Dowling
51	▼	9.9/17	N	Law And Order
52	▲	9.6/16	C	Guns Of Paradise
53	▼	9.5/16	N	Hunter
53	▲	9.5/15	C	Top Cops
55	▲	9.3/15	C	Flash
55	▲	9.3/16	A	Primetime Live
57		9.2/16	N	Amer. At War, Pt.2
58	▲	8.6/13	F	Get A Life
58		8.6/15	C	War In The Gulf
60	▲	8.3/13	F	Parker Lewis
61		8.0/12	F	Cops: Coast To Coast
61	▲	8.0/14	A	Young Riders
63		7.9/12	N	Exposé
63	▲	7.9/12	A	Gabriel's Fire
65	▲	7.8/12	F	Babes
66	▲	7.1/12	F	Cops 2
67	▲	6.8/11	F	Beverly Hills, 90210
68	▲	6.5/11	F	America's Most Wanted
68	▲	6.5/11	F	True Colors
70	▲	6.3/11	F	Cops
71		5.7/10	F	World's Greatest Stunts
72	▲	5.3/9	F	Totally Hidden Video
73		4.8/8	F	Comic Strip Live
74		4.0/7	F	Get A Life Spec.

FREEZE FRAMES: Syndication Scorecard * **Week ended Feb. 17**

Rank	Program (Syndicator)	Rtg	Stns	Cvg
1	Wheel of Fortune, syn. (King World)	14.9	234	99
2	Jeopardy! (King World)	13.5	219	99
3	Star Trek: Next Generation (Paramount)	13.0	239	98
4	Oprah Winfrey (King World)	11.1	224	99
5	Entertainment Tonight (Paramount)	8.7	184	96
6	Cosby Show (Viacom)	8.6	210	99
7	Wheel of Fortune, wknd. (King World)	8.5	187	84
8	Current Affair (20th Century Fox TV)	7.9	193	96
9	Magic I (Buena Vista)	7.5	187	93
10	Donahue (Multimedia)	6.4	234	99
11	Inside Edition (King World)	6.2	134	82
12	Super Force (Viacom)	5.8	175	95
13	Star Search (TPE)	5.6	172	96
14	Sally Jessy Raphael (Multimedia)	5.4	197	96
15	Hard Copy (Paramount)	5.2	172	91

* Nielsen weekly pocketpiece

Source: Nielsen and Broadcasting's own research.

CHANGING HANDS

PROPOSED STATION TRADES

By volume and number of sales

Last Week:

AM's □ **$1,270,000** □ **5**

FM's □ **$15,000** □ **3**

AM-FM's □ **$53,450,000** □ **7**

TV's □ **$4,606,000** □ **2**

Total □ **$59,341,000** □ **17**

Year to Date:

AM's □ **$9,966,539** □ **37**

FM's □ **$38,384,103** □ **43**

AM-FM's □ **$86,092,617** □ **34**

TV's □ **$86,474,000** □ **15**

Total □ **$220,917,250** □ **129**

For 1990 total see Jan. 7, 1991 Broadcasting

WRVA(AM)-WRVQ(FM) Richmond and WWDE-FM Hampton (Norfolk), all Virginia □ Sold by Edens Broadcasting to Force II Communications for approximately $28 million. **Seller** is headed by Gary Edens, who also owns WRBQ(AM) St. Petersburg, WRBQ-FM Tampa, both Florida; KQY-AM-FM Phoenix and KKLQ-AM-FM San Diego. **Buyer** is company formed by Robert F.X. Sillerman and Norm Feuer. Sillerman owns equity interests in Legacy Communications, Capstar Communications, Legacy Broadcasting Partners and Metropolitan Broadcasting Corp. WRVA is fulltimer with adult contemporary format on 1140 khz and 50 kw. WRVQ has CHR format on 94.5 khz and antenna 455 feet above average terrain. WWDE-FM has adult contemporary format on 101.3 mhz with antenna 505 feet above average terrain. *Broker: Blackburn & Co. Inc.*

KMEO-AM-FM Phoenix □ Sold by Group W Broadcasting to Bonneville International for $12 million cash. Stations were purchased in 1985 for $11 million. **Seller** is headed by Jim Thompson, and owns nine AM's, nine FM's, and five VHF affiliates in Philadelphia, San Francisco, Boston, Baltimore and Pittsburgh. **Buyer** is headed by Rodney H. Brady, and owns five AM's, seven FM's, and CBS affiliates in Salt Lake City and Seattle. KMEO has adult contemporary format on 740 khz with 1 kw day and 292 w night. KMEO-FM has adult contemporary format on 96.9 mhz with 100 kw and antenna 1,560 feet. *Broker: Star Media Group.*

KDBN(AM) Dallas and KMEZ-FM Fort Worth □ Sold by Gilmore Broadcasting Corp. to Granum Communications for $9 million cash. KMEZ-FM was sold in 1988 for $11 million. **Seller** is headed by James Gilmore and also owns WLVE(FM) Miami Beach and CBS affiliate WEHT(TV) Evansville, Ind. **Buyer** is headed by Herb McCord and has no other broadcast interests. KDBN has news format on 1489 khz with 5 kw day and 1000 w night. KMEZ-FM has adult contemporary format on 107.5 mhz with 25 kw and antenna 1,647 feet. *Broker: Blackburn & Co. Inc.*

KLJB-TV Davenport, Iowa Sold by Davenport Communications Ltd., debtor-in-possession, to Quad Cities Television Acquisition for $3.706 million cash at closing. **Seller** is headed by Gary Brandt and Richard Greenblatt and has no other broadcast interests. **Buyer** is headed by Milton Grant, John H. Markley, William D. Towe, Gregory B. Maffei and Huntsville Television Holdings Corp. (100% VS). Huntsville Television Holdings owns 100% of voting stock of Huntsville Television Acquisition Corp., licensee of WZDX(TV) Huntsville, Ala. Grant is president of and holds 53.1583% interest in Grant Broadcasting Corp. of Little Rock, which has 25% limited partnership in Little Rock Communications Associates, licensee of KLRT(TV) Little Rock, AR. KLJB is Fox affiliate on ch. 18 with 3000 kw vis., 300 kw aur. and antenna 1,010 feet. *Broker: The Ted Hepburn Co.*

WUSQ-AM-FM Winchester, Va. □ Sold by The Holt Corp. of Virginia to Benchmark Communications for $3.65 million. **Seller** is headed by Arthur Holt, who owns WTKX-AM-FM Pensacola, Fla.; WKAP(AM) Allentown and WZZO(FM) Bethlehem, both Pennsylvania, and WOAD(AM)-WJMI(FM) Jackson, Miss. Holt also heads Holt Corp. Appraisal and Consulting. **Buyer** is headed by Joe Mathias and Phillip Rainwater, who also own WDOV(AM)-WDSD(FM) Dover, Del., and cable operations in Virginia and California. WUSQ(AM) is fulltimer with adult contemporary format on 610 khz with 500 w. WUSQ-FM has C&W format on 102.5 mhz with 32 kw and antenna 630 feet above average terrain. *Broker: Brian Cobb and Charles Giddens of Media Venture Partners.*

KYEL-TV Yuma, Ariz □ Sold by Beacon Broadcasters Ltd. to Southwest Triangle Television Co. for $900,000 cash at closing. **Seller** is headed by Robert C. Gilbertson and Duncan Fraser, and is subsidiary of Beacon Communications Corp. Beacon Broadcasters is licensee of WCFT-TV Tuscaloosa, Ala., which is being sold to Federal

Continues on page 61.

SOLD!

KTQQ-FM, Lake Charles, Louisiana has been sold by **KSIG Broadcasting Company, Inc.**, Louis M. Basso, Jr., President to **21st Century Communications, Inc.**, Keith Baine Martin, President for $808,760.

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WASHINGTON

FCC GIVES USER FEE PLAN TO HILL

Broadcasters would have to pony up $4.9 million, cable, $9.3 million; congressmen take opportunity to air fin-syn concerns

The FCC expects to collect up to $4.9 million in annual "user fees" from radio and TV broadcasters (see chart, right), according to a proposal unveiled last week by FCC Chairman Alfred Sikes. Under the same proposal, cable's contribution would be $9.3 million.

Sikes discussed the fees with members of a House Appropriations Subcommittee panel last week. The FCC estimates it can raise $70 million annually from the fees, which would be levied against those doing business with the commission. For example, the agency hopes to collect up to $25.3 million from mobile radio, cellular radio, satellite operators, long distance and local phone companies.

Additionally, some subcommittee members used the hearing as an opportunity to express an interest in the FCC's proposed fin-syn rulemaking (see "Top of the Week").

The user fees would be in addition to the $41 million the agency says it will collect this year from filing and processing charges. President Bush's proposed fiscal 1992 budget called for a new user fee as a means of fighting the federal deficit (BROADCASTING, Feb. 11). The FCC would keep $65 million to cover the cost of doing business with the remainder going to the Treasury Department. It is up to Congress to authorize the user fee it. legislation.

Sikes also appeared before the subcommittee to discuss the agency's request of $133.4 million for its fiscal 1992 budget, $17.6 million more than the commission received in its FY '91 appropriation. The additional funds would be used to hire 38 new employes in the common carrier bureau. The commission also plans to use the resources to devote more attention to high definition television and toward the development of other new high-technology communications services. Sikes said the commission needs to upgrade its computer system. Subcommittee Chairman Neal Smith (D-Iowa), however, was not optimistic about the chances that Congress will meet that request.

Moreover, Smith and Carr foresee other problems associated with enactment of a user fee. Carr said the House Ways and Means Committee may view it as a tax and feel the appropriation committee's action in this area is an invasion of its jurisdiction. The FCC's authorizing committee, Energy and Commerce, is also likely to take an interest in the proposal. "I don't know how we can work it out," said Smith. "We want to work it out," he added.

Under the proposed fee schedule, AM and FM-radio operators would account for $2.7 million, and TV $2.2 million. For example, an FM station (class C, C1, C2, or B) would have to pay an annual fee of $500, a VHF TV $3,000 and a UHF $1,000. Noncommercial radio and TV stations would pay $100 dollars apiece, making their contibution to the kitty $135,100 and $35,000.

Cable systems would have to pay $150 for the cable antenna relay service (CARS) plus $300 for each cable franchise. The FCC expects to collect a total of $324,750 from cable operators for their CARS license and about $9 million from a cable franchise charge.

The fee schedule did not go over well with the National Association of Broadcasters. NAB spokesman Walt Wurfel said broadcasters already spend "considerable resources to serve the public interest." The user fee proposal, he said, is "inconsistent" with broadcasters public service role. Moreover, the fees place a "fiscal burden on the many stations which already operate at a loss."

The National Cable Television Association also was not pleased. An NCTA spokesman said: "On first blush it's hard to see why we should be paying licensing fees to the federal government when we already pay more than $800 million per year to our local franchising authorities."

"We are obviously concerned," said David Donovan, vice president, legal and legislative affairs, Association of Independent Television Stations, "the user fee moves us toward a payment-for-spectrum-system—something that was never envisioned by the framers of the Communications Act." –KM

FCC'S PROPOSED ANNUAL USER FEES

Category	*No. of users*	*Annual fee*	*FCC's est. revenue*
AM (Class-II, daytime)	835	$150	$125,250
AM (Class-III, daytime)	491	$100	$49,100
AM (Class I, fulltime)	77	$500	$38, 500
AM (Class-II, fulltime)	773	$300	$231,900
AM (Class-III, fulltime)	1,742	$200	$348,400
AM (Class-IV, fulltime)	1,017	$100	$101,700
FM (Noncommercial)	1,351	$100	$135,100
FM (Classes C, C1, C2, and B	2,206	$500	$1,103,000
FM (Classes A, B1, C3, and D)	2,262	$300	$678,600
TV (noncommercial)	350	$100	$35,000
TV (UHF)	554	$1,000	$554,000
TV (VHF)	554	$3,000	$1,662,000
LPTV	7,721	$100	$772,100
Auxiliaries	50,000	$100	$5,000,000
ITFS	859	$100	$85,900
International shortwave	25	$100	$2,500
CARS	2,165	$150	$324,750
CATV franchises	29,964	$300	$8,989,200

ACTIONS

Actions

■ **Montecito, CA** Commission has dismissed interlocutory appeal by Claudia Bratton following Review Board's denial of her motion to recuse Board Chairman Marino and Board Member Blumenthal from this proceeding for new FM at Montecito, CA. (MM docket 87-426 by MO&O [FCC 91-46] adopted February 7 by Commission.)

■ **Topeka, KS** Granted application of Margaret Escriva for new FM on channel 223A (92.5 mhz) at Topeka; denied competing application of SpaceComm, Inc. (MM docket 89-293 by Initial Decision [FCC 91D-6] issued February 7 by ALJ Joseph Chachkin.)

■ **Hawesville, KY** Affirmed decision of presiding Administrative Law Judge and granted application of Joe L. Aldridge for new FM on channel 288A (105.7 mhz) at Hawesville; and denied competing application of Tower Communications, Inc. (MM docket 89-132 by Decision [FCC 91R-15] adopted February 8 by Review Board.)

■ **Bay Shore, NY** Denied Long Island Music Broadcasting Corporation's request for supplement, petition for reconsideration in Bay Shore, NY, FM proceeding. (MM docket 87-246 by MO&O [FCC 91-45] adopted February 7 by Commission.)

■ **Naguabo, PR** Affirmed decision of administrative law judge and granted application of Efrain Archilla Diez for new FM on channel 225A (92.9 mhz) at Naguabo, and denied competing applications of Naguabo Broadcasting Company, Jorge G. Blanco Galdos, Reyes Ruiz Rivera, and Hector Negron Cartagena. (MM docket 88-343 by Decision [FCC 91R-10] adopted January 29 by Review Board.)

CALL LETTERS

Grants

Existing FM's

KZPL(FM)	Voice of Inter Christ Evang Inc ; Yuma, AZ
WDHM(FM)	Rebecca L. Coomer; Salem, IN
WJUS(FM)	Juanma, Inc.; Fort Walton Beach, FL
WKED-FM	Allan Communications Inc.; Frankfort, KY
WLMB(FM)	American Christian Radio Service Inc.; Lima, OH
WMYJ(FM)	Transmedia, Inc.; Pocomoke City, MD
WWTA(FM)	Talbot Academy; Marion, MA
WXEI(FM)	Crossroads Communications Inc.; Flora, MS
WYDA(FM)	Lisa M. Parish; Gracevillle, FL
WYDB(FM)	Johnny W. Shaw and Opal J. Shaw; Bolivar, TN
WYDF(FM)	Lake Cities Broadcasting Corp.; Montpelier, OH
WYDG(FM)	Vector Broadcasting Inc.; Lexington, MI
WYDH(FM)	Alabama Native American Broadcasting Co.; Atmore, AL
WYDR(FM)	St WE&Common Bd.; Eau Claire, WI
WYDS(FM)	Howard G. Bill; Decatur, IL

New TV

KLSB-TV	Radnor Broadcasting Co. Inc.; Nacogdoches, TX

Existing AM's

KHCB(AM)	KTUS Houston Christian Broadcasters Inc.; Galveston, TX
KKFB(AM)	KWIC Modern World Media Inc.; Beaumont, TX
WMDH(AM)	WCTW WTL Indiana Inc.; New Castle, IN
WNTE(AM)	WKQS Pennsylvania Broadcasting Associates II; Johnstown, PA
WOCC(AM)	WGZB Radio Corydon Inc.; Corydon, IN
WRPT(AM)	WMDK Peterborough Broadcasting Company Inc.; Peterborough, NH
WTME(AM)	WXGL Christian Family Radio; Lewiston, ME

Existing FM's

KFAN(FM)	KBKK Eason and Janice Fritz; Johnson City, TX
KHCB(FM)	KTUS Houston Christian Broadcasters Inc.; Galveston, TX
KHOW-FM	KSYY KHOW&SYY Inc.; Denver
KIOX-FM	KXGC-FM North Star Communications Inc.; El Campo, TX
KJOI-FM	KJOI US Radio Ltd.; Freeport, TX
KONC-FM	KFAN Gillespie Broadcasting Company; Fredericksburg, TX
KRGY(FM)	KRIX Sunbelt Radio Acquisition Inc.; Brownsville, TX
KTCM(FM)	KAPH Alpha Broadcasting Inc.; Kingman, KS
KTHX(FM)	KSXY Lobster Communications Coporation; Reno, NV
KUI(FM)	KYII KLIF Company; Dallas
KXYL-FM	KISJ-FM Central Texas Communications Inc.; Brownwood, TX
KZZD(FM)	KGAM New Life Fellowship Inc.; Wichita, KS
WGKL-FM	WZZG Tenore Broadcasting Company; Charlotte, NC
WJZE(FM)	WDJY United Broadcasting Company Inc.; Washington
WKRH(FM)	WIGY Kaleidoscope Inc.; Bath, ME
WLKC(FM)	WXJE Jefferson Broadcasting Inc.; Henderson, NY
WMDH-FM	WMDH WTL Indiana Inc.; New Castle, IN
WMOG-FM	WPFI WBA Partnership; St. Simons Island, GA

SUMMARY OF BROADCASTING & CABLE

BROADCASTING

SERVICE	ON AIR	CP's [1]	TOTAL [2]
Commercial AM	4,986	246	5,232
Commercial FM	4,402	944	5,346
Educational FM	1,442	305	1,747
Total Radio	10,830	1,495	12,325
Commercial VHF TV	553	18	571
Commercial UHF TV	564	178	742
Educational VHF TV	124	3	127
Educational UHF TV	229	16	245
■ Total TV	1,470	215	1,685
VHF LPTV	192	173	365
UHF LPTV	629	1,015	1,645
■ Total LPTV	821	1,188	2,009
FM translators	1,874	337	2,211
VHF translators	2,709	94	2,803
UHF translators	2,256	371	2,627

CABLE

Total subscribers	53,900,000
Homes passed	71,300,000
Total systems	10,823
Household penetration†	58.6%
Pay cable penetration	29.2%

* Includes off-air licenses. † Penetration percentages are of TV household universe of 92.1 million. [1] Construction permit. [2] Instructional TV fixed service. ‡ Studio-transmitter link. Source: Nielsen and Broadcasting's own research.